

**Army Regulation 135–205**

**Army National Guard and Army Reserve**

# **Enlisted Personnel Management**

**Headquarters  
Department of the Army  
Washington, DC  
1 September 1994**

**Unclassified**

# ***SUMMARY of CHANGE***

135-205

Enlisted Personnel Management

Change 18. This change--

- o Provides that HQDA, ODCSPER, may approve exceptions to the regulation (para 1-6).
- o Requires ARNGUS soldiers serving on AGR status under title 32, U.S. Code, to be considered under the Qualitative Retention Program (para 4-3).
- o Reduces the years of service for USAR soldiers in the zone of consideration for qualitative retention (para 4-4).
- o Specifies that a flag will not be in the record of a soldier being considered by a qualitative retention board (para 4-5).
- o Requires that the CSM assigned to Special Forces Groups must be airborne qualified and possess MOS 18Z (para 6-5).
- o Provides that AGR CSM will be stabilized in position for 4 years (para 6-6).
- o Specifies that PERSCOM will convene the USAR CSM Selection Board annually (para 6-11a).
- o Specifies that CSM vacancies will be projected for 12 months (para 6-11b).
- o Requires CSM vacancy announcements to include days on which the command normally conducts scheduled training assemblies (para 6-11 c).
- o Specifies that the DOR and PEBD for a 1SG or MSG is based on the 1st day of the month in which the USAR CSM board is convened (para 6-11 b).
- o Permits an NCO to apply for more than one CSM vacancy (para 6-14 d).
- o Requires body fat content worksheet be enclosed with the commander's statement contained in the records packet (para 6-15).
- o Permits USAR CSM management authority to retain a CSM for up to 24 months beyond stabilization term (para 6-22e).
- o Permits HQDA, ODCSPER, to consider exceptions to the CSM reappointment policy (para 6-28b).
- o Makes minor administrative corrections and changes.
- o Renames figure 4-4 as table 4-2 to make this publication compatible with the Army electronic publishing database.

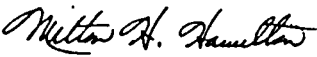
Army National Guard and Army Reserve

## Enlisted Personnel Management

By Order of the Secretary of the Army:

GORDON R. SULLIVAN  
General, United States Army  
Chief of Staff

Official:

  
MILTON H. HAMILTON  
Administrative Assistant to the  
Secretary of the Army

**History.** This publication was originally printed on 15 May 1978. Since that time, permanent Changes 1 through 17 have been issued. As of 1 June 1990, those changes remain in effect. This UPDATE printing incorporates those changes into the text. This UPDATE printing also publishes a Change 18. The portions being revised by this change are highlighted. This publication has been reorganized to make it compatible with the

Army electronic publishing database. No content has been changed.

**Summary.** This regulation prescribes policies, responsibilities, and procedures for Special Duty Assignment (Proficiency Pay) (SDA(PP)) for U.S. Army Reserve personnel, the Individual Ready Reserve Enlisted Personnel Management System, the Qualitative Retention Program, and the U.S. Army Reserve Command Sergeants Major Program.

**Applicability.** This regulation applies to all enlisted members of the Army National Guard (ARNG) and the USAR.

**Proponent and exception authority.** The proponent of this regulation is the Deputy Chief of Staff for Personnel. The Deputy Chief of Staff for Personnel has the authority to approve exceptions to this regulation that are consistent with controlling law and regulation. The Deputy Chief of Staff may delegate this approval authority, in writing, to a division chief under their supervision within the proponent agency who holds the grade of colonel or the civilian equivalent.

**Army management control process.** This regulation is subject to the requirements of AR 11–2. It contains internal control provisions but does not contain checklists for conducting internal control reviews. These

checklists are contained in the DA Circular 11 series publications.

**Supplementation.** Supplementation of this regulation and establishment of command and local forms are prohibited without prior approval from the ODCSPER, Policy Coordination Office, ATTN: DARP–ZPO, 9700 Page Boulevard, St. Louis, MO 63132–5200.

**Interim changes.** Interim changes to this regulation are not official unless they are authenticated by the Administrative Assistant to the Secretary of the Army. Users will destroy interim changes on their expiration dates unless sooner superseded or rescinded.

**Suggested improvements.** Users are invited to send comments and suggested improvements to DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to ODCSPER, Policy Coordination Office, ATTN: DARP–ZPO, 9700 Page Boulevard, St. Louis, MO 63132–5200.

**Distribution.** Distribution of this publication is made in accordance with the requirements on DA Form 12–09–E, block number 2559, intended for command level B for Active Army, A for ARNG and A for USAR.

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## Chapter 1 General Information

### 1-1. Purpose

This regulation prescribes policies, responsibilities, and procedures for—

- a. Special Duty Assignment (Proficiency Pay) (SDA(PP)) for U.S. Army Reserve (USAR) personnel.
- b. The Individual Ready Reserve (IRR) Enlisted Personnel Management System.
- c. (*Rescinded.*)
- d. The Qualitative Retention Program (QRP).
- e. The USAR Command Sergeants Major Program.

#### 1-1.1. References

Required and related publications and prescribed forms are listed in appendix A.

### 1-2. Explanation of abbreviations and terms

Abbreviations and special terms used in this regulation are explained in the consolidated glossary at the back of this volume.

### 1-3. Policy

Effective management and evaluation of ARNG and USAR enlisted personnel resources is necessary for successful mission accomplishment. It is Department of the Army policy to—

- a. Utilize soldiers in positions equal to their military qualifications and personal attributes, and
- b. Promote an atmosphere which will motivate each soldier to attain his or her full potential as a soldier.

### 1-4. Responsibilities

- a. The Deputy Chief of Staff for Personnel (DCSPER), Headquarters, Department of the Army (HQDA), has general staff responsibility for the formulation, management, and evaluation of manpower and personnel policies, plans, and programs for all components of the Army.
- b. Within their areas of jurisdiction, State adjutants general and area commanders are responsible for the personnel management programs outlined in this regulation.
- c. The term “area commands” and “area commander” as used throughout this regulation are defined in the consolidated glossary at the back of this volume.

### 1-5. Employment and volunteer work of spouse of military personnel

Neither a soldier's marital status nor the employment, educational pursuits, or the volunteer service activities of the soldier's spouse may be considered in the qualitative retention process (chap 4) or the Command Sergeant Major selection process (chap 6). Information in personnel files regarding such factors will not be considered by commanders, board members, or others involved in the retention selection process.

## Chapter 2 Special Duty Assignment Pay(SDAP) for USAR Personnel

### 2-1. General

This chapter applies only to U.S. Army Reserve (USAR) soldiers. It prescribes policies and provides instructions for the administration of Special Duty Assignment Pay (SDAP). This is a monetary incentive designed to encourage soldiers to qualify for and serve in the following assignments:

- a. Recruiter (MOS OOE).
- b. Reenlistment NCO (MOS 79D).
- c. Drill Sergeant (Special qualification identifier (SQI)—X).
- d. Specialty Designated USAR personnel. USAR AGR soldiers who converted from the Active Army under the Army Transition/

Conversion — Army Reserve (ATCAR) Program and are performing in a specially designated position, will continue to receive the same level of SDAP they were receiving as a member of the Active Army.

### 2-2. Individual eligibility criteria

An enlisted member of the USAR in a special duty assignment is eligible to receive SDAP if all of the following conditions are met:

- a. Entitled to basic pay and serving on—
  - (1) One or more days of—
    - (a) Active duty for special work (ADSW).
    - (b) Temporary tour of active duty (TTAD).
    - (c) Active duty in an Active Guard Reserve (AGR) status.
    - (d) (*Rescinded.*)
  - (2) More than 180 days of active duty for training (ADT) .
- b. Serving in rank of PFC or higher.
- c. Completed the special schooling required for qualification in the special duty assignment to which assigned.
  - (1) If assigned to recruiting duties (MOS 00E) before 1 October 1978, must have attended any 2-week resident recruiting school at the U.S. Army Soldiers Support Center (USASSC) to be eligible for full levels of SDAP. Effective 1 April 1985, a soldier assigned to recruiting duties prior to 1 October 1978, who has not attended a 2-week resident recruiting school at USASSC, is eligible to receive SDAP at the minimum level (SD-1, \$55 per month) in recognition of on-the-job training in the special duty assignment. This soldier is not eligible for higher award levels until schooling at USASSC is completed.
  - (2) If assigned to recruiting duties (MOS 00E) on or after 1 October 1978, must have completed the Reserve Components Recruiting Course or the Army Recruiter Course.
  - (3) If assigned to reenlistment duties (MOS 79D) before 1 October 1978, must have completed any 2-week resident session at USASSC for either the Reserve Components Reenlistment NCO course or the ARNG Career Counselor Course (for Reserve personnel).
  - (4) If assigned to reenlistment duties (MOS 79D) on or after 1 October 1978, must have completed any 2-week resident session at USASSC for either the Reserve Components Recruiting and Retention Course or the ARNG Career Counselor Course (for Reserve personnel).
- d. Qualified for and serving in the designated special duty assignment.
- e. Not receiving any other type of SDAP.

### 2-3. The award level and monthly amount of SDAP

- a. The award levels and monthly amounts of SDAP specified in this chapter were in effect on 1 September 1987.
- b. The monthly amount of SDAP authorized for each level of award is as follows:
  - (1) SD-1 = \$55.
  - (2) SD-2 = \$110.
  - (3) SD-3 = \$165.
  - (4) SD-4 = \$220.
  - (5) SD-5 = \$275.

#### 2-3.1. SDAP entitlement for drill sergeant (SQI X) duty

- a. A drill sergeant awarded special qualification identifier (SQI X) who meets the criteria of paragraph 2-2 and is performing duties in an authorized drill sergeant (SQI X) position is entitled to SDAP. Effective 1 September 1988, the award level is based on the number of months that have accrued from the date the drill sergeant gained SDAP entitlement for performance of duty in SQI X as follows:
  - (1) Zero to 6 months—SD-3.
  - (2) Seven to 12 months—SD-4.
  - (3) Over 12 months—SD-5.
- b. A soldier who has had a break in drill sergeant duties and previously received SDAP at the P-1 (\$50), SD-2 (\$110), or SD-3 (\$165) level will start at the SD-3 level before being eligible for the SD-4 level.

### **2-3.2. SDAP entitlement for reenlistment (retention) NCO (MOS 79D) duty**

a. A reenlistment (retention) NCO awarded MOS 79D who meets the criteria of paragraph 2-2 and is assigned to and performing the duties of an authorized MOS 79D position, is entitled to SDAP. The award level is based on the number of months that have accrued from the date the reenlistment (retention) NCO gained SDAP entitlement as follows:

- (1) Zero to 6 months—SD-1.
- (2) Seven to 12 months—SD-2.
- (3) Over 12 months—SD-3.

b. A reenlistment (retention) NCO (MOS 79D) authorized to receive SDAP at the SD-3 level on 31 Aug 1987, but had less than 12 months MOS 79D experience, is authorized to continue entitlement at the SD-3 award level.

c. A soldier who has had a break in reenlistment (retention) NCO (MOS 79D) duties and previously received SDAP at the P-1 (\$50), SD-2, or SD-3 level will start at the SD-3 level, if eligible.

### **2-3.3. SDAP entitlement for Total Army career counselor duty**

a. A soldier who meets the criteria of paragraph 2-2 and is attached or assigned to an Active Army command or installation for duty as a Total Army Career Counselor (TACC), is entitled to SDAP. The award level is based on the number of months that have accrued from the date the soldier gained SDAP entitlement for performance of duty in MOS 00E, as follows:

- (1) Zero to 6 months—SD-1.
- (2) Seven to 12 months—SD-2.
- (3) Over 12 months—SD-3.

b. A TACC authorized to receive SDAP at the SD-3 level on 31 Aug 1987, but had less than 12 months 00E experience, is authorized to continue entitlement at the SD-3 award level.

c. A soldier entitled to SDAP as a recruiter (00E), or reenlistment (retention) NCO (79D), that has completed over 12 months SDAP entitlement, will start at the SD-3 level when assigned for duty as a TACC.

d. A soldier who completed at least 12 months service in MOS 00E or 79D duties and has had a break in the performance of such duty, will start at the SD-3 level when assigned duty as a TACC.

### **2-3.4. SDAP entitlement for staff recruiter (MOS 00E) duty**

a. A soldier awarded MOS 00E who meets the criteria of paragraph 2-2 and is performing the duties of staff recruiter assigned or attached to a brigade or higher headquarters, is entitled to SDAP. The award level is based on the number of months that have accrued from the date the soldier gained SDAP entitlement for performance of duty in MOS 00E, as follows:

- (1) Zero to 6 months—SD-1.
- (2) Seven to 12 months—SD-2.
- (3) Over 12 months—SD-3.

b. A staff recruiter authorized to receive SDAP at the SD-3 level on 31 Aug 1987, but had less than 12 months 00E experience, is authorized to continue entitlement at the SD-3 award level.

c. A soldier entitled to SDAP as a recruiter (00E) and has completed over 12 months SDAP entitlement, will start at the SD-3 level when assigned for duty as a staff recruiter.

d. A soldier who completed 12 months service in MOS 00E duty and has had a break in the performance of such duty, will start at the SD-3 level, if eligible, when assigned to staff recruiter duties.

### **2-3.5. SDAP entitlement for guidance counselor or recruiter (MOS 00E) duty**

a. A soldier performing guidance counselor or recruiter (MOS 00E) duty who meets the criteria of paragraph 2-2 and is assigned or attached for duty at a recruiting battalion level, or below, is entitled to SDAP. The award level is based on the number of months that have accrued from the date the soldier gained SDAP entitlement in the performance of duty in MOS 00E as follows:

- (1) Zero to 3 months—SD-3.

(2) Four to 9 months—SD-4.

(3) Over 9 months—SD-5.

b. A soldier who has had a break in recruiting duties and previously received SDAP at the—

(1) P-1 (\$50), P-2 (\$100), P-3 (\$150), SD-2, or SD-3 level will start at the SD-3 level, if eligible, and will complete 3 months at that level before being eligible for the SD-4 level.

(2) SD-4 or SD-5 level will start at the SD-4 level, if eligible, and will complete 6 months at that level before being eligible for the SD-5 level.

### **2-4. Constructive credit**

Soldiers who served in special duty assignments prior to 1 October 1978 may be granted constructive credit for the prior experience gained from full-time assignment to a special duty position during periods of active duty for training (ADT), or special active duty for training (SADT), of 180 days or more. This prior experience may be used to determine the award level. Recruiting personnel who served in a special duty assignment before 1 October 1978 and have not completed the required schooling (para 2-2c (1)), will not be granted constructive credit for previous experience until the schooling has been completed.

### **2-5. Termination of SDAP**

a. Termination of SDAP will conform to the Active Army policy in AR 600-200, chapter 5, and AR 37-104-3, chapter 8. Separate input to the Joint Uniform Military Pay System (JUMPS) is required at the time of termination. JUMPS will not automatically terminate SDAP. In general, a soldier is eligible to receive SDAP provided the soldier is currently performing duties in a special duty assignment and all the criteria of paragraph 2-2 have been met.

b. SDAP will be terminated automatically when a soldier completes a tour of ADSW, TTAD, or ADT(in excess of 180 days) and returns to the location at which he or she entered on the tour of duty according to the instructions on the self-terminating orders.

### **2-6. Requests for orders**

Orders format 330 (AR 310-10, app A) will be issued to award, increase, or terminate SDAP. Termination orders are not required when a soldier completes a tour of ADSW, TTAD, or ADT(in excess of 180 days) (para 2-5b).

a. Requests for SDAP orders will be submitted on DA Form 4187 (Personnel Action).

b. Orders to award or increase SDAP will be issued by the appropriate command authorized to publish orders for ADSW, TTAD, or ADT(in excess of 180 days).

c. The U.S. Army Recruiting Command will issue SDAP orders for soldiers serving on active duty in an AGR status in MOS 00E.

d. Requests for orders to award SDAP to AGR soldiers (except for MOS 00E) will be sent to Commander, ARPERCEN, ATTN: DARP-AR, 9700 Page Boulevard, St. Louis, MO 63132-5200, and will be processed as follows:

(1) After the soldier completes resident training, which qualifies him or her for the award of MOS 00E or 79D, the school commandant will send a copy of the Certificate of Training to CG, ARPERCEN. The CG, ARPERCEN, will then issue the orders awarding proficiency pay.

(2) Orders authorizing SDAP for soldiers assigned to Special Designated Duties will be processed at the time of assignment by CG, ARPERCEN.

(3) Requests for orders to award SDAP to USAR personnel performing the duties of drill sergeants (SQI X) will be sent to CG, ARPERCEN by the appropriate commanders.

(4) Requests for the award of higher level pay must be fully justified and sent by the appropriate commander to CG, ARPERCEN, who will make the final determination.

(5) Requests for orders are not required for soldiers who reenter active duty in an AGR status and are not required to attend formal

schooling because they have previously completed the required special schooling.

## Chapter 3

### Enlisted Personnel Management System— U.S. Army Individual Ready Reserve

#### 3-1. Purpose and scope

This chapter prescribes policies and procedures and establishes responsibilities for the Enlisted Personnel Management System—U.S. Army Individual Ready Reserve (EPMS-IRR). It applies to the Active Army and the U.S. Army Reserve.

a. EPMS-IRR is the personnel management system designed to provide for the effective management of the Individual Ready Reserve (IRR) soldier's training and professional development to the extent that he or she will be a viable mobilization asset.

b. The EPMS-IRR provides IRR soldiers with the opportunity for a balanced mix of training experience and career opportunities. This is accomplished through assignment to USAR Troop Program Units (TPUs) and Individual Mobilization Augmentee (IMA) positions, attendance at service schools, and counterpart training with Active Army organizations.

(1) TPU assignments. EPMS-IRR places priority on encouraging IRR soldiers to join USAR and ARNG units.

(2) Military education. Soldiers will be encouraged to participate in Active Army service schools, USARF schools, and Army correspondence course programs to increase their MOS proficiency.

(3) Counterpart training. Counterpart training is directed at developing the skills of each IRR soldier. It gives the soldier an opportunity for short active duty for training (ADT) tours with an Active Army organization. Training is in designated positions to increase knowledge, skills, and performance of the individual's military occupational specialties (MOS). The training will be based on a Personnel Management NCO's evaluation of the individual's professional needs and the mobilization requirements of the U.S. Army.

c. IRR soldiers will be given every opportunity to maintain MOS proficiency and further enhance their military careers. They will be encouraged to actively participate in highly flexible training phases and schooling and to seek assignment to USAR and ARNG units.

#### 3-2. Responsibilities

a. DCSPER establishes policy for EPMS-IRR.

b. Under the general personnel policy of DCSPER, the Chief, Army Reserve (CAR) budgets for training, provides policy direction for and monitors the personnel management system of EPMS-IRR.

c. *(Rescinded.)*

d. CG, FORSCOM, ensures that EPMS-IRR effectively supports USAR TPUs.

e. Active Army unit/installation commanders will coordinate counterpart training with Cdr, ARPERCEN (DARP-EPO).

f. CG, ARPERCEN, manages EPMS-IRR and coordinates with Army Reserve Command (ARCOM) and USAR General Officer Command (GOCOM) commanders and USAREC in filling unit shortages.

#### 3-3. Operational procedures

a. CG, ARPERCEN, will—

(1) Serve as Department of the Army (DA) point of contact for questions concerning EPMS-IRR.

(2) Implement policies for EPMS-IRR in coordination with other members of the Army staff and execute the program.

(3) Designate a Personnel Management NCO (PMNCO) to manage a proper number of USAR IRR soldiers.

b. Each ARCOM/GOCOM will designate and advise the Cdr, ARPERCEN, ATTN: DARP-EPO, of a point of contact for the coordination of enlisted personnel assignments.

c. The PMNCO will provide counseling, career planning, and training for each soldier. The PMNCO's mission is to—

(1) Retain IRR soldiers.

(2) Update their mobilization data.

(3) Keep those soldiers for whom responsible, MOS qualified according to Army mobilization requirements.

(4) Assist in maintaining TPUs at authorized strength through unit liaison for assignment of MOS qualified soldiers wherever possible.

d. The ARPERCEN counterpart training coordinator will telephonically coordinate individual counterpart training requirements with the Active Army installation or organization concerned. Enlisted personnel will be trained only at those installations or organizations that have agreed to support the Counterpart Training Program according to paragraph f below.

e. ARPERCEN will furnish the name, grade, MOS, and proposed training dates of nominees for counterpart training tours to each installation/organization commander concerned. Training in the reservist's secondary or additional MOS may be requested by the Active Army unit/installation commander through the ARPERCEN training coordinator.

f. Commanders supporting counterpart training will ensure that—

(1) A point of contact is designated for coordinating this effort with ARPERCEN. The point of contact will provide Commander, U.S. Army Reserve Personnel Center, ATTN: DARP-EPO-T, 9700 Page Boulevard, St. Louis, MO 63132-5200, with information concerning IRR training requirements for their respective installation or organization. The following information will be provided by 1 October of each respective training year and updated as required throughout the year:

(a) Type of training by MOS (field/garrison).

(b) Telephone number of the point of contact.

(c) Telefax instructions.

(d) Reporting instructions (building, uniform, date, and time).

(e) Transportation available from airport (costs).

(f) Privately owned vehicle (POV) authorization.

(g) Military transportation available (rental car if required).

(h) Available quarters (costs).

(i) Available messing facilities (costs).

(j) Available facilities for issuing identification (ID) cards and tags.

(k) Available medical facilities to conduct physical examinations.

(l) Available dental facilities for panoramic x ray.

(m) Financial considerations (such as advanced pay authorization, any limitations, and final settlement).

(n) Available clothing issue facilities.

(o) Other special considerations relative to IRR training with the organization or installation.

(2) The training performed is that which was scheduled or mutually agreed to by the soldier, ARPERCEN, and the installation.

(3) Noncommissioned officer evaluation reports (NCO-ERs) are prepared for sergeants (SGTs) and above per AR 623-205. Ensure that they are submitted to Commander, ARPERCEN, ATTN: DARP-PRE-E, 9700 Page Boulevard, St. Louis, MO 63132-5200, on completion of the counterpart training tour.

(4) Complete DA Form 5011-R (Training Evaluation Summary) on all IRR specialists (SPC) and below who participate in AT/ADT. Mail it within 15 days after completion of such training to Commander, ARPERCEN, ATTN: DARP-EPO, 9700 Page Boulevard, St. Louis, MO 63132-5200. DA Form 5011-R will be reproduced locally on 8 1/2- by 11-inch paper. *(A copy for reproduction purposes is located at the back of this volume.)*

g. CG, ARPERCEN, will develop the overall annual projected requirements for counterpart training by installation or organization. This projection will be based on the installation or organization's estimate of the maximum number of trainees and tours it can accommodate monthly over the next fiscal year. Send this information directly to Commander, ARPERCEN, ATTN: DARP-EPO, 9700 Page Boulevard, St. Louis, MO 63132-5200. FORSCOM installations or organizations will furnish an information copy to Commander, FORSCOM, ATTN: AFOP-RCM, Fort McPherson, GA 30330-6000, not later than 1 August each year.

### 3-4. Implementation

Continuation or expansion of the EPMS-IRR program is contingent on fund availability.

## Chapter 4 Qualitative Retention Program

### Section I Introduction

#### 4-1. Qualitative Retention Program (QRP) objectives

A continuing program of qualitative retention is essential to provide for progression of qualified enlisted personnel at proper intervals in their careers. The QRP will—

- a. Ensure only the *best qualified* soldiers are retained in a troop unit beyond 20 years of qualifying service for retired pay. These soldiers will be retained for continuing assignment to the comparatively few senior noncommissioned officer (NCO) positions.
- b. Provide for career incentive.
- c. Ensure an opportunity for advancement to the higher grades at the peak years of a soldier's effectiveness.
- d. Satisfy the continuing requirement for senior NCOs by the appropriate commands.
- e. Provide the command with a tool to control enlisted personnel inventory and manage career progression. The QRP is not designed nor intended to be used in lieu of separation or removal procedures authorized by other regulations (that is, unsatisfactory performance, unsatisfactory participation, failure to meet body fat standards, and so forth).

#### 4-2. QRP responsibilities

- a. Chief, National Guard Bureau (CNGB) will monitor and support the QRP for the Army National Guard of the United States (ARNGUS).
- b. Chief, Army Reserve (CAR) will monitor and support the QRP for the USAR.
- c. The following officials will implement and administer the QRP within their areas of jurisdiction:
  - (1) State adjutants general for ARNG soldiers.
  - (2) Area commanders (see glossary) for USAR TPU soldiers. QRP responsibility may be delegated to the following commanders, but may not be further delegated.
    - (a) A commander of an ARCOM or GOCOM for soldiers subordinate to the ARCOM or GOCOM.
    - (b) The first general officer command subordinate to the area command for soldiers under the general officer command, when there is no ARCOM or GOCOM subordinate to the area command.
    - (3) (*Rescinded.*)

#### 4-3. QRP applicability

This chapter provides policy and procedures governing the selective retention of soldiers in ARNGUS units and USAR TPUs. It also prescribes the composition and function of qualitative retention boards. The QRP policy contained in this chapter applies to—

- a. ARNG soldiers with 20 or more years of qualifying service for retired pay including those serving on Full-Time National Guard Duty (FTNGD) under title 32, USC. The procedures provide for a biennial review of the military personnel records of all soldiers with the required service. The purpose of the review is to determine retention potential and acceptability for reenlistment or extension of enlistment. It does not apply to soldiers serving on active duty under title 10, USC.
- b. USAR soldiers assigned to TPUs of the Selected Reserve. It does not apply to soldiers serving on active duty in an AGR status. QRP provides for a review of a soldier's military personnel records to determine retention potential. This review is required for all soldiers who will have 20 or more years of qualifying service for

retired pay at age 60, and are within the zones of consideration prescribed by paragraph 4-4a(3).

c. Procedures governing qualitative retention are without regard to race, color, religion, sex, or national origin.

### Section II Qualitative Retention Program Procedures

#### 4-4. Zones of consideration for qualitative retention

a. Qualitative retention boards will consider all unit soldiers who are within the following zones by the date the board convenes, with the exception of those listed in paragraph 4-5:

- (1) ARNG.
  - (a) Have at least 20 years of qualifying service for retired pay at age 60 as verified by a notification of eligibility for retired pay at age 60 issued per AR 135-180, paragraph 2-3.
  - (b) Where previously selected for retention, however, the commander has referred them to the board for revalidation of their retained status.
- (2) (*Rescinded.*)
- (3) USAR. Have at least 20 years of qualifying service for retired pay at age 60, and—
  - (a) Is a SFC/PSG or below and has completed 21 years of total military service.
  - (b) Is an SFC, PSG, MSG, or 1SG and has completed 25 years of total military service.
  - (c) Is a MSG, 1SG, or SGM and has completed 27 years of total military service.
  - (d) Is a SGM and has completed 29 years of total military service.
  - (e) Were previously selected for retention. However, the commander has referred them to the board for revalidation of their retained status.
- b. ARNG qualitative retention boards will examine records of ARNG soldiers in the zone of consideration every 2 years unless, based on recommendation of the board, the convening authority approves that an soldier's record be reviewed the following year.
- c. USAR qualitative retention boards will be convened to examine the records of USAR soldiers in the zones of consideration listed in a(2) and (3) above.
- d. A chart which displays the USAR zones of consideration is shown at table 4-3.

#### 4-5. Soldiers not to be considered under the QRP

Qualitative retention boards will not consider soldiers who—

- a. Are assigned to the—
  - (1) ARNG and have not been issued a notification of eligibility for retired pay at age 60 per AR 135-180, paragraph 2-3, on the date the board convenes.
  - (2) USAR and have not completed 20 qualifying years of service for retired pay at age 60 on the date the board convenes.
- b. Are within 9 months of reaching age 60 on the date the board convenes.
- c. Are not *fully qualified* by grade and military occupational specialty (MOS) for continued membership in the unit. (Not applicable to the ARNG.)
- d. Have a bar to reenlistment or extension in effect. (Not applicable to the ARNG.)
- e. Are under suspension of favorable personnel actions (AR 600-8-2), unless the suspension action was initiated for failure to meet the body fat standards per AR 600-9, or for failure to pass the Army Physical Fitness Test (APFT) per AR 350-15. However, in such cases a flag will not be present in the military records of a USAR soldier being considered by a board under the best qualified selection process.
- f. Are USAR soldiers in the following categories:
  - (1) SSG and below (unless pending promotion to SFC) who have completed a total of 25 years' military service.
  - (2) SFC/PSG (unless pending promotion to MSG) and have completed a total of 27 years' military service.



(3) MSG/1SG (unless pending promotion to SGM) and have completed a total of 29 years' military service.

(4) SGM (unless selected for CSM) and have completed a total of 31 years' military service.

(5) Command sergeants major.

g. Are ARNG State Command Sergeants Major.

h. Are USAR personnel previously not selected for retention by a board. Based on their Army Reserve Technician (ART) status, they were authorized retention in their current USAR assignment until age 60 (para 4-18d(2)).

#### **4-6. Scheduling of retention boards**

Qualitative retention boards will be convened annually during January, February, or March. The authorities specified in paragraph 4-2c will convene the boards.

#### **4-7. Procedures required to support QRP**

a. The boards will examine the record of each soldier within the zone of consideration (para 4-4a). The boards will provide a report of personnel recommended for continued unit service (para 4-14).

b. Commanders specified in paragraph 4-2c will—

(1) Ensure that soldiers' records are maintained to permit an accurate and equitable board appraisal.

(2) Announce the time and site of the annual qualitative retention board to all subordinate commands.

(3) Select and appoint board members and publish orders.

(4) Issue instructions to subordinate units for submitting required records and information.

(5) Refer personnel records to the board.

(6) Provide required administrative support.

(7) Approve or disapprove the board's report.

(8) Issue selection or nonselection memorandums within 30 days following approval of the board's report. These memorandums will be issued over the convening authority's signature (fig 4-5 and 4-6).

(9) Be sure that soldiers not recommended for retention are discharged or reassigned as appropriate (para 4-18).

c. Unit commanders will—

(1) Identify unit soldiers who fall in the zone of consideration for qualitative retention (para 4-4a).

(2) Ensure all soldiers in the zone of consideration (para 4-4a) are notified. (Use the sample memorandum at fig 4-1 as a guide.)

(3) Ensure personnel records are current, correct, and audited by the soldier.

(4) Include with the records any comments or recommendations deemed pertinent to retention consideration.

(5) (ARNG only) Include a statement justifying the retention of a SGT or below if considered appropriate.

(6) Send the required information and personnel records to the convening authority (para 4-2c).

d. The enlisted soldier, when notified of pending board consideration, will—

(1) Indicate by endorsement (fig 4-2) the option preferred, if not selected for retention. These options are as follows:

(a) Reassignment to the Retired Reserve.

(b) Reassignment to Control Group (Reinforcement) of the Individual Ready Reserve (IRR).

(c) Honorable discharge.

(2) Complete the endorsement on the notification memorandum (fig 4-2). Return the memorandum to the unit commander within 10 days after receipt. Soldiers refusing to complete the endorsement or failing to respond in a reasonable period will be reported to the unit commander. The commander will send the soldier's record and a statement of the facts to the convening authority. If not selected for retention, the soldier will be discharged.

(3) Audit his or her military personnel records to ensure they are current and correct.

(4) If desired, include with the records any comments regarding the pending board consideration. Such comments may include, but

are not limited to, the unit commander's comments or recommendations.

### **Section III**

## **Composition and Conduct of Qualitative Retention Boards**

#### **4-8. Appointing authority**

Authority to appoint and convene qualitative retention boards rests with the authorities specified in paragraph 4-2.

#### **4-9. Board composition**

a. Boards will be composed of three command sergeants major (CSM) and two commissioned officers for all enlisted personnel. One officer in the grade of colonel (or lieutenant colonel, if necessary) will serve as president of the board.

b. An additional officer, warrant officer (WO), or NCO will be appointed as recorder without vote.

c. One of the board members must be female if females are considered. One member must be a minority. Orders appointing the board will identify female and/or minority members.

d. A person being considered by the board will not serve as a member of the board or as a recorder.

#### **4-10. Instructions to board members**

a. A memorandum of instruction will be issued to each board member by the convening authority (fig 4-2).

b. Boards will be briefed by a designated representative of the convening authority. This briefing will cover the important features of the letter of instructions and this chapter. It will also give board members an opportunity to ask questions.

#### **4-11. The board oath**

a. The following oath will be administered by the recorder to the members of the board: "You (identify each member by grade and name) do solemnly swear (or affirm) that you will without prejudice or partiality, and having in view both the special fitness of individual soldiers and the efficiency of the (Army National Guard) (Army Reserve), perform duties imposed on you, and further, that you will not divulge the proceedings or results of this board except to proper authority." (Each member will respond, "I do.")

b. The president of the board will administer the following oath to the recorder: "You (identify by grade and name), as a recorder of this board, do solemnly swear (or affirm) that you will perform duties imposed on you by the president of the board, and further, that you will not divulge the proceedings or results of this board except to proper authority." (The recorder of the board will respond, "I do.")

#### **4-12. Conduct of the board**

a. Boards will evaluate the future benefits that can be expected to accrue to the ARNG or USAR (as appropriate) from the continued membership status of each person. The board should consider the following factors:

(1) Demonstrated performance as attested by evaluation reports, review of the Military Personnel Records Jacket—U.S. Army (MPRJ), and other evidence.

(2) Medical condition and physical fitness are such that there are no significant assignment limitations.

(3) Any other factor having a bearing on a soldier's future performance and contribution to a unit.

b. If the board vote is not unanimous, the dissenting member(s) may prepare a minority report to support his or her position. A copy of this report will be attached to each copy of the board report.

#### **4-13. Board recommendations for retention**

a. ARNG qualitative retention boards may recommend ARNG soldiers in the zone of consideration (para 4-4a (1)) for unit retention.

b. USAR qualitative retention boards, by considering soldiers within the zone of consideration (para 4-4a(3) and table 4-3), may recommend USAR soldiers for unit retention—

(1) In the rank of SSG or below on completion of 21 years of total military service and have been determined as *best qualified* for retention. Unless separated under other authority, these soldiers may be retained until completion of 25 years' total military service.

(2) In the rank of SFC/PSG on completion—

(a) Of 21 years' total military service and have been determined as *best qualified* for retention. Unless separated under other authority, these soldiers may be retained until completion of 25 years' total military service at which time their records will be reviewed again;

(b) Of 25 years' total military service and have been determined as *best qualified* for retention. Unless separated under other authority, these soldiers may be retained until completion of 27 years' total military service.

(3) In the rank of 1SG/MSG on completion—

(a) Of 25 years' total military service and have been determined *best qualified* for retention. Unless separated under other authority, these soldiers will be retained until completion of 27 years' total military service at which time their records will be reviewed again;

(b) Of 27 years' total military service and have been determined *best qualified* for retention. Unless separated under other authority, these soldiers will be retained until completion of 29 years' total military service.

(4) In the rank of SGM, on completion—

(a) Of 27 years' total military service and have been determined *best qualified* for retention. Unless separated under other authority, these soldiers will be retained until completion of 29 years total military service.

(b) Of 29 years' total military service and have been determined *best qualified* for retention. Unless separated under other authority, these soldiers will be retained until completion of 31 years' total military service.

c. USAR soldiers who are retained under *b* .1 above will not again be considered for retention unless—

(1) Promoted to a higher grade. Zones of consideration in the higher grades are outlined in paragraph 4-4a(3).

(2) The commander has recommended revalidation of their retained status.

(3) They are pending promotion to a higher grade. In this case, they must be considered for retention under the criteria prescribed for the higher grade. "Pending promotion" is defined as a soldier who has been recommended for promotion by a promotion selection board; the board proceedings have been approved by the convening authority; and the soldier has been placed on an order-of-merit listing pending a unit vacancy.

#### 4-14. Board reports

a. Before adjournment, the board will complete a report of the board proceedings in the format shown in table 4-2. Table 4-2 shows a sample format for the qualitative retention board statistical report of qualitative retention board deliberations which is an example of enclosure 8 of figure 4-3.

b. The recorder will prepare a signed statement indicating the number of soldiers considered by grade and racial category and the number of soldiers not retained by grade and racial category. This will be attached to the board report.

c. A copy of the board report with all enclosures will be routed through the agencies shown below to arrive at HQDA, Office of the Deputy Chief of Staff for Personnel, ATTN: DAPE-MPE, WASH DC 20310-0300, not later than 15 June of each year.

(1) For ARNG reports, send through the Chief, National Guard Bureau, ATTN: NGB-ARP-E, WASH DC 20310-2500.

(2) For USAR reports, send through HQDA, Office of the Chief, Army Reserve, ATTN: DAAR-PE, WASH DC 20310-2415.

#### 4-15. Protective markings

All copies of the board's report will be marked FOR OFFICIAL USE ONLY. This is to prevent premature disclosure of board recommendations. These markings will be removed on approval by the convening authority.

## Section IV

### Approval, Disapproval, and Disposition

#### 4-16. Approval or disapproval of board recommendations

a. The convening authority will review the qualitative retention board recommendations. Within 30 days following adjournment of the board, the convening authority will—

(1) Approve the report as submitted.

(2) Disapprove the whole report and require the board to reconsider all cases. This will occur if the board's report contains substantial administrative errors or procedural deficiencies that adversely affect those considered. The convening authority will give supplemental guidance to the board to correct the deficiencies.

(3) Modify the board's report to move a soldier's name from the not recommended list to the recommended list. Justification for any such modification must be attached and made a part of the board's report. The convening authority is prohibited from moving a soldier's name from the recommended list to the not recommended list.

(4) Require board reconsideration of any individual case in which material error in the record as reviewed by the board is established. The convening authority may do this at any time during 90 days following adjournment of the board.

b. Some of the reasons for disapproving a board's report are as follows:

(1) The board did not have the proper members.

(2) The instructions to the board were materially different from the prescribed format (fig 4-2).

(3) The board oath was not properly administered.

(4) Improper board format or content which cannot be corrected administratively.

#### 4-17. Safeguard against premature separation from unit membership

No soldier will be separated from unit membership under this chapter until notified of eligibility to receive retired pay at age 60. This does not apply to soldiers who do not qualify for retired pay because they lack wartime service (AR 135-180, para 2-1).

#### 4-18. Disposition of soldiers not selected for retention

a. Soldiers who were not selected for retention are considered *fully qualified* for continued participation in the USAR as assigned IRR soldiers. This is provided they have not reached 60 years of age.

b. Soldiers not selected will be processed for discharge or reassignment according to the option selected under paragraph 4-7d(1) and indicated by endorsement (fig 4-1). However, a USAR ART may request continued retention in his or her current assignment per paragraph *d* below.

c. Separation must be completed within 60 days following approval of the board's report.

(1) If a memorandum certifying a USAR soldier's eligibility for retired pay has not been issued, separation will be completed within 60 days after the certification is issued.

(2) Should issue of the certification be delayed more than 90 days after approval of the board report, authority for continued retention of a USAR soldier must be approved by—

(a) (*Rescinded.*)

(b) The commander (para 4-2c ) that convened the QRB which resulted in the soldier's nonselection.

(c) (*Rescinded.*)

d. An ART who has not been selected for retention may submit a request for retention in his or her current assignment per AR 140-315, paragraph 8i. Within 15 days after the announcement of the board's results, the request may be sent through Cdr, ARPER-CEN ( DARP-PAT-I) to the Office, Chief Army Reserve, ATTN: DAAR-PE, WASH DC 20310-2418. The ART's military status or assignment will not be changed while the request is pending final determination by the CAR acting for Secretary of the Army.

(1) If the CAR does not approve the request, the soldier will be processed for discharge or reassignment according to the option

selected under paragraph 4-7d(1) and indicated by endorsement (fig 4-2).

(2) If the CAR approves the request, the soldier will be retained in his or her current assignment until they attain age 60 unless removed for cause. The soldier will not again be considered by later retention boards. However, since the soldier was not best qualified for military retention by a board, but retention was approved to provide for civil service annuity eligibility, the soldier will not be

eligible for later promotion consideration (AR 140-158, para 1-14q).

#### 4-19. Reassignment policy

A soldier who has not been selected for retention by a qualitative retention board will be reassigned to the IRR, Retired Reserve, or discharged depending on the soldier's option (para 4-7d). If reassigned to the IRR or Retired Reserve, a subsequent reassignment back to a unit subordinate to the command that convened the QRB is prohibited. (See AR 140-10, table 4-1, rule 8.)

**Table 4-1**  
**USAR qualitative retention zones chart (Rescinded.)**

**Table 4-2**  
**Sample format for the Qualitative Retention Board statistical report filed as an enclosure to the board report**

Statistical Report of Qualitative Retention Board Deliberations							
A. Considered:				B. Selected:			
Rank	Gender	Category	Considered	Rank	Gender	Category	Selected
SGM	Male	White	1	SGM	Male	White	1
SGM	Female	Black	1	SGM	Female	Black	1
SGM	Female	White	1				
SGM	Male	Black	1				
MSG	Male	White	2	MSG	Male	White	1
MSG	Female	Black	1	MSG	Female	Black	1
MSG	Female	White	1	MSG	Female	White	1
MSG	Male	Black	1				
MSG	Male	Asian	1	MSG	Male	Asian	1
SFC	Female	Black	2	SFC	Female	Black	1
SFC	Female	White	1				
SFC	Male	Black	2	SFC	Male	Black	1
SFC	Male	White	2	SFC	Male	White	1
SFC	Male	Asian	2	SFC	Male	Asian	1
SFC	Male	Indian	1	SFC	Male	Indian	1
SSG	Male	Asian	1				
SSG	Male	Hispanic	2	SSG	Male	Hispanic	1
SSG	Female	White	3	SSG	Female	White	1
SSG	Female	Black	1	SSG	Female	Black	1
SSG	Male	White	4	SSG	Male	White	2
SSG	Male	Black	2	SSG	Male	Black	1
SGT	Male	Black	1	SGT	Male	Black	1
SGT	Female	White	1	SGT	Female	White	1

#### C. Recapitulation:

##### Considered—

9 White Males  
7 Black Males  
7 White Females  
5 Black Females  
4 Asian Males  
2 Hispanic Males  
1 Indian Male  
35 Total considered

##### Selected—

5 White Males  
3 Black Males  
3 White Females  
4 Black Females  
2 Asian Males  
1 Hispanic Male  
1 Indian Male  
19 Total selected

D. This report provides statistical data on the Qualitative Retention Board deliberations as required by AR 135-205, paragraph 4-14b.

(Signature of board recorder)

**Table 4-3**  
**USAR qualitative retention zones chart**  
**(NOTE: This table is effective on or after 1 Jul 93.)**

20 years qualifying service for retired pay	21 years total military service	25 years total military service	27 years total military service	29 years total military service	31 years total military service
SSG & below	X <sup>1</sup>	X <sup>2</sup>			
SFC/PSG	X <sup>1</sup>	X <sup>1</sup>	X <sup>2</sup>		
1SG/MSG		X <sup>1</sup>	X <sup>1</sup>	X <sup>2</sup>	
SGM			X <sup>1</sup>	X <sup>1</sup>	X <sup>3</sup>

Notes:

<sup>1</sup>Separated from TPU unless retained by board.

<sup>2</sup>Separated from TPU unless advanced to or pending promotion to next grade.

<sup>3</sup>Separated from TPU.

MEMORANDUM FOR:

*(Soldier scheduled for retention consideration)*

SUBJECT: Notification of Qualitative Retention Board Review

1. This memorandum is notification that your military records are scheduled for review by a Qualitative Retention Board. The board will be convened on *(convening date of the board)* according to AR 135-205, chapter 4. By reviewing records, this board will select the best qualified personnel for continued unit membership. As a fully qualified unit soldier you will be considered for retention. Personal appearance before the board is not authorized.

2. Your Military Personnel Records Jacket (MPRJ) has been prepared for submission to the board. You are encouraged to review your MPRJ and the attached comments *(if any)*. To review your records, complete the attached endorsement and bring this memorandum with you to unit headquarters within 10 days.

3. If you do not wish to review your records, complete the attached endorsement. Mail the endorsement to this unit within 10 days in the envelope provided.

4. Failure to reply by endorsement within 10 days will not cause any delay in the board review of your records. The board will be informed that your reply by endorsement was not received. If not selected for retention, you will be discharged from all military service. Such discharge will not affect your retirement eligibility.

5. You will be notified of your selection or nonselection for retention after adjournment of the board.

*(Signature block of unit commander)*

**1st End**

SUBJECT: Notification of Qualitative Retention Board Review

TO: *(appropriate unit commander)*

1. I have *(reviewed) (declined to review)* my Military Personnel Records Jacket (MPRJ).

2. If I am not selected for retention, I choose one of the following option:

a. Transfer to Control Group *(Reinforcement)* of the Individual Ready Reserve (IRR).

b. Transfer to the Retired Reserve.

c. Honorable Discharge.

3. I have reviewed my unit commander's comments. I have the following comments to make:

None

As follows:

*(Signature block of enlisted soldier and date)*

**Figure 4-1. Sample memorandum with endorsement of notification**

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SUBJECT: Memorandum of Instruction for the Qualitative Retention Board

President and Members

Qualitative Retention Board

1. The qualitative retention program is designed to—

- a. Provide maximum career progression and incentive.
- b. Provide recognition for sustained excellent performance.
- c. Provide highly motivated enlisted soldiers the opportunity for retention in a troop program unit based on quality performance.
- d. Ensure that only the best qualified enlisted soldiers are retained in units of the ARNGUS and troop program units of the U.S. Army Reserve.

2. This qualitative retention board is convened under AR 135-205. The board will recommend the best qualified soldiers, in the following zones of consideration, for continued troop program unit participation:

a. (Army National Guard only). Soldiers must have at least 20 years of qualifying service for retired pay at age 60.

b. (U.S. Army Reserve only). Soldiers must have at least 20 years of qualifying service for retired pay at age 60, and be—

(1) A staff sergeant or below and have completed 21 years' total military service. On recommendation of this board, these soldiers may be retained in a troop program unit until they complete a total of 25 years' military service.

(2) A sergeant first class or platoon sergeant and have completed—

(a) 21 years' total military service. On recommendation of this board, these soldiers may be retained in a troop unit until they complete a total of 25 years' military service.

(b) 25 years' total military service. On recommendation of this board, these soldiers may be retained in a troop unit until they complete a total of 27 years' military service.

(3) A master sergeant or first sergeant and have completed—

(a) 25 years' total military service. On recommendation of this board, these soldiers may be retained in a troop unit until they complete a total of 27 years' military service.

(b) 27 years' total military service. On recommendation of this board, these soldiers may be retained in a troop unit until they complete a total of 29 years' military service.

(4) A sergeant major and have completed—

(a) 27 years' total military service. On recommendation of this board, these soldiers may be retained in a troop program unit until they complete a total of 29 years' military service.

(b) 29 years total military service. On recommendation of this board, these soldiers may be retained in a troop unit until they complete a total of 31 years' military service.

(5) Soldiers previously selected for retention. They have been referred by the commander to this board for revalidation of their retention status. The unit commander has determined that the manner of performance has deteriorated to such an extent as to cause a recommendation for termination of retention status.

3. All soldiers who will be considered by this board are fully qualified for continued participation with a troop program unit.

4. Headquarters, Department of the Army, requires that only the best qualified soldiers be retained. It does not prescribe specific qualifications necessary for best qualified status and selective retention. However, general guidance on the factors to be considered in determining best qualified status and retention potential are outlined below.

a. Best qualified status is based on demonstrated performance and future potential. Evaluation of demonstrated performance or potential for future service cannot be complete or objective without a review of the entire record. The "total person" concept should govern. An isolated example of excellence or mediocrity should not be used as a basis for selection or nonselection. The analysis of individual records should include a careful review of—

(1) The degree of efficiency demonstrated in the assignments held; the degree of responsibility and the magnitude of the functions involved; and the leadership and managerial ability required.

(2) General physical condition and medical fitness standards for retention as prescribed in AR 40-501, chapter 3, and AR 600-9. The soldier should be able to perform without significant limitation in the event of mobilization.

**Figure 4-2. Sample memorandum of instruction for the qualitative retention board—Continued**

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(3) Demonstrated performance as attested by efficiency reports, letters of commendation, and other evaluations which cite the soldier's manner of performance.

b. The weight to be given derogatory information is a matter for the collective judgment of the board. The board should give the greatest weight to the most recent years of service and the significance of that information. Undue weight should not be given to unfavorable comments of a derogatory nature which are followed by a continuous outstanding performance of duty. Incidents of a disciplinary nature should be weighed against the soldier's overall manner of performance. Bear in mind that it is not the function of the board to punish the soldier by withholding selection.

5. Recommendations of the board will be marked FOR OFFICIAL USE ONLY and will be so considered until approved by the convening authority. Details of the board proceedings, whether recorded or not, will not be disclosed except as required by proper authority.

*(Signature block of convening authority)*

Note: Identical instructions will be given to all qualitative retention boards convened under this regulation.

**Figure 4-2. Sample memorandum of instruction for the qualitative retention board**

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*(Letterhead)*

(File Symbol)

MEMORANDUM FOR: *(Convening Authority)*

SUBJECT: Report of Qualitative Retention Board

1. References.

- a. Paragraph *(number)* Orders Number *(number)* HQ *(name)* Dated *(date)* (encl 1).
- b. Memorandum of Instructions to Qualitative Retention Board (encl 2).

2. To comply with instructions contained in the above references, the Qualitative Retention Board appointed therein convened at *(hours)* *(date)* at *(place)*.

3. The following board members were present:

*(Name)* President.

*(Name)* Member (Female).

*(Name)* Member.

*(Name)* Member (Minority).

*(Name)* Member.

*(Name)* Member.

*(Name)* Recorder (w/o vote).

4. The board has carefully reviewed the records of those soldiers in the zone of consideration for selective retention in units of the *(Army National Guard)*. *(U.S. Army Reserve)*.

5. The names of those soldiers recommended as best qualified for continued retention are at the following enclosures:

- a. Command sergeants major and sergeant major—enclosure 3.
- b. First sergeants and master sergeants—enclosure 4.
- c. Sergeants first class and platoon sergeants—enclosure 5.
- d. Staff sergeants and below—enclosure 6.

6. The names of those soldiers not recommended as best qualified for continued retention are listed by rank at enclosure 7.

7. A statistical report of the number of soldiers considered and retained by rank, ethnic category and gender is at enclosure 8.

8. The board adjourned at *(hours)* on *(date)*.

9. Recommend the soldiers listed on enclosure 3 through 6 be retained in units of the *(Army National Guard)* *(U.S. Army Reserve)*.

AUTHORITY LINE:

8 Encl

*(Signature block, board president)*

**Figure 4-3. Report of qualitative retention board**

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**Figure 4-4. Sample format for the Qualitative Retention Board statistical report filed as an enclosure to the board report (Figure 4-4 has been changed to table 4-2.)**

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MEMORANDUM THRU: *(command channels)*

FOR: *(soldier concerned)*

SUBJECT: Selection for Retention under AR 135-205

1. I am pleased to inform you that the Qualitative Retention Board has recommended you as among the best qualified for continued retention in a unit of the (Army National Guard) (Army Reserve). I have approved the recommendations of the board.
2. You should take particular pride in the confidence that has been evidenced by your selection. I urge you to continue performing your assigned duties to the best of your ability at all times and to take every opportunity to enhance your military education.
3. The ( *(State)* Army National Guard) (United States Army Reserve) will continue to rely on you in meeting its objectives.

*(Signature block of convening authority)*

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**Figure 4-5. Selection memorandum format**

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MEMORANDUM THRU: *(command channels)*

FOR: *(soldier concerned)*

SUBJECT: Nonselection for Continued Unit Participation

1. While you are fully-qualified soldier of the (Army National Guard) (U.S. Army Reserve) AR 135-205 provides that only the best qualified be retained in units. The best qualified soldiers are selected by a qualitative retention board. The regulation further provides that a soldier who is not selected for retention will be removed from unit participation. You were considered for qualitative retention and were not selected. Accordingly, not later than (date) you will be discharged, transferred to Control Group (Reinforcement) of the Individual Ready Reserve (IRR), or to the Retired Reserve according to the option you selected by endorsement.
2. In determining the best qualified personnel for continued unit participation, I can assure you that the board discharged its duties in a thorough and impartial manner. The character of your service has been noted to be honorable and this is reflected in your records.
3. Your many personal sacrifices to the ( *(State)* Army National Guard) (U.S. Army Reserve) are sincerely appreciated. You may take just pride in having contributed to the success of the Reserve Components as a viable force capable of meeting today's challenges.

*(Signature block of convening authority)*

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**Figure 4-6. Nonselection memorandum format**

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## **Chapter 5**

### **The Reserve Components Command Sergeants Major Program (RCCSMP) (Rescinded)**

## **Chapter 6**

### **The USAR Command Sergeants Major Program**

#### **Section I**

#### **Introduction**

##### **6-1. Scope**

a. This chapter establishes policies and procedures for the assignment and utilization of USAR command sergeants major (CSM) and command sergeants major designees. A CSM designee is defined as a sergeant major (SGM), first sergeant (1SG)(P), or master sergeant (MSG)(P), selected by a CSM selection board for appointment to CSM.

b. Except for a SGM assigned to a CSM position on or after 1 November 1985 and before 1 November 1987 (para 5-2.1), this chapter applies to CSMs and CSM designees—

- (1) Assigned to troop program units (TPUs).
- (2) Assigned to Control Group (Reinforcement) of the Individual Ready Reserve (IRR).
- (3) Assigned to individual mobilization augmentee (IMA) positions.
- (4) Serving on active duty in an AGR status.

##### **6-2. Mobilization or order to active duty**

In the event of mobilization or order to active duty (other than active duty in an AGR status), a copy of each CSM's DARP Form 1856 (Enlisted Records Brief) will be sent to Commander, PERSCOM, ATTN: TAPC-EPZ-E, ALEX, VA 22331-0400.

##### **6-3. Management of CSMs and CSM designees**

All CSMs and CSM designees will be managed under a centralized management system conducted by the authorities indicated below. Management will include but is not limited to, assignments, reassignments, training, reclassification, appointments, and removal. Management authority will be retained in the headquarters or agencies indicated. Responsibility for the appointment and management of CSMs and CSM designees is a function of—

a. Each area command for troop program units assigned to that command. Area commanders are authorized to delegate this authority to Army Reserve command (ARCOM) and general officer command (GOCOM) commanders, but not below.

b. CG, ARPERCEN (DARP-EPA-SM) for soldiers assigned to the IRR or to IMA positions.

c. Office, Chief Army Reserve (OCAR) (DAAR-SOEMO) is the approval authority for the appointment and assignment of CSM serving on AGR status and is responsible for all other management functions relating to CSMs and CSM designees serving on AGR status.

##### **6-4. Objectives**

a. The USAR CSM Program is designed to improve the effectiveness of soldiers occupying the most responsible enlisted positions in the USAR. The objective of the program is to appoint the best qualified soldiers possessing the highest qualities of leadership, integrity, dedication, and professionalism to fill CSM positions.

b. The objectives of the management system are to—

- (1) Ensure the efficient use of CSM to enhance USAR readiness and mission accomplishment.
- (2) Provide USAR commands with CSM whose experience and training have been expanded by progressive assignments.
- (3) Improve the effectiveness of CSM by providing a diversity of assignments.

(4) Require CSM to accept greater responsibility by functioning at progressively higher levels.

(5) Avoid stagnation of CSM in assignments that will preclude the normal career progression of other senior noncommissioned officers (NCOs).

#### **Section II**

#### **Assignment and Utilization**

##### **6-5. General assignment policy**

a. Only the authorities in paragraph 6-3 will assign CSMs and CSM designees to CSM positions. Assignment action for such personnel will not be made without the prior approval of the appropriate authority. This includes the movement of a CSM or CSM designee to another position in the same command.

(1) A CSM designee will be assigned and appointed CSM by the appointment authority (para 6-3) when an available CSM position cannot be filled by the reassignment of another CSM.

(2) A CSM will be reassigned—

- (a) To TPU or IMA positions, as available.
- (b) As a CSM to the IRR or if eligible, to the Retired Reserve.
- (c) As an AGR CSM to AGR CSM positions, as available.

b. A CSM can be assigned to any level of CSM position without regard to career management field (CMF) or past military occupational experience except CSM positions in Special Forces Groups. CSM in Special Forces Groups must be airborne qualified and possess MOS 18Z. Failure to meet the Special Forces qualifying requirements will constitute removal from CSM position.

c. Coordinated selection and assignment functions between ARCOMs/GOCOMs is necessary and encouraged as it will provide increased potential for more diversified and progressive CSM assignments.

d. The three basic levels of CSM position assignments are battalion, brigade, and nominative.

(1) Battalion level positions are those in which the CSM serves in a unit commanded by a lieutenant colonel or colonel.

(2) Brigade level positions are those in which the CSM serves in a unit commanded by a brigadier general, or commanded by a colonel with at least one subordinate unit authorized a CSM. U.S. Army Reserve Forces (USARF) School and Noncommissioned Officer Academy CSM positions are considered as brigade level positions.

(3) Nominative positions are as follows:

- (a) ARCOM or Division CSM positions.
- (b) GOCOM CSM positions if the GOCOM reports directly to an area commander.
- (c) IMA CSM positions commanded by a major general or higher.
- (d) The OCAR CSM and ARPERCEN CSM positions. These are the only AGR positions that are nominative.

##### **6-6. Routine assignment procedures**

a. The initial assignment (appointment) of a CSM should be a battalion level. Based on performance, the CSM should be considered for progression to a brigade level position. After successful performance at brigade level a CSM should be considered for nominative positions as described in paragraph 6-7. In some commands, this ideal progression of CSM may be precluded by geographic limitations or TOE/TDA authorizations. In such cases, commands are encouraged to adopt an alternate assignment policy to employ and extend the experience of a CSM, if possible.

b. CSM will be stabilized in their assigned position for 4 years according to paragraph 6-22.

c. Not later than 6 months prior to completing a stabilized assignment, the command will report the CSM to the authorities in paragraph 6-3 as available for immediate reassignment to another CSM position.

d. Commanders' requests for reassignment of CSM within their commands will be submitted to the authorities in paragraph 6-3, for approval. CSM requests for reassignment consideration may be sent to the appropriate authority in paragraph 6-3, through command



channels. The request must include the recommendation and endorsement of each commander in the chain of command.

#### **6-7. Nominative selection and assignment procedures**

a. When a nominative position is established, or a nominative position is a current or projected vacancy, the appropriate appointment authority (para 6-3) will query the commander. This is to determine if there are any special qualifications the commander may desire in the CSM to be considered.

b. After the appointment authority has been informed of any special qualifications, the nominative position will be announced as available for selection. The method of announcement must ensure that IRR, IMA, TPU, and AGR CSM that will not be automatically considered, have the opportunity to request consideration for selection. The announcement will include any special qualifications desired by the commander. It will also include the closing date for receipt of applications and other administrative details.

c. After the closing date, the appointment authority will screen the files of the available CSM to ensure the applicant meets the special qualifications, if any, desired by the commander and is otherwise eligible for selection.

(1) For a TPU nominative position (para 6-5d (3)(a) or (b)) the following soldiers will be considered:

(a) All TPU CSMs who reside within 50 miles or 90 minutes travel of the position.

(b) TPU CSMs who do not reside within 50 miles or 90 minutes travel of the position and have requested consideration.

(c) IRR, IMA CSMs who have requested consideration.

(d) AGR CSMs who have requested consideration for assignment to the position on release from active duty.

(2) For an IMA nominative position (para 6-5d (3)(c)), the following soldiers will be considered:

(a) All IMA CSMs.

(b) All IRR CSMs.

(c) TPU CSMs who have requested consideration.

(d) AGR CSMs who have requested consideration for assignment to the position on release from active duty.

(3) For an AGR CSM nominative position (para 6-5 d(3)(d)), the following soldiers will be considered:

(a) All AGR CSMs.

(b) TPU, IRR, and IMA CSMs who have requested consideration and agreed to entry on AGR status if selected.

d. The appointment authority will provide the personnel files of the qualified applicants to the commander for consideration and selection. The commander may—

(1) Review the records and make the selection.

(2) Reduce the number of records to be reviewed by requesting the appointing authority to screen the records and nominate the best qualified for his or her selection. The following steps are taken when this process is used:

(a) The appointing authority will convene a board to nominate the best qualified applicants. The board will consist of an uneven number of officers and CSM with the appropriate representation of minority and female personnel.

(b) The board will screen the records and nominate the best qualified for the commander's consideration and selection. The board will nominate the number specified by the commander. If the commander has not specified a number, the board will nominate at least 3 soldiers.

e. After completing the process in (1) or (2) above, the commander will make his or her final selection and inform the appointing authority. The appointing authority will process the selectee for assignment to the position on the date requested by the commander.

#### **6-8. Appointment of acting CSM**

a. When a command experiences the loss of an authorized CSM and the position cannot be filled by the reassignment of a TPU, IRR, IMA, or AGR CSM, or the assignment of a CSM designee, the command may appoint an acting CSM. This acting condition will

remain until a CSM selection board selects a CSM designee to fill the position, or until a CSM is assigned to the position.

b. The acting CSM should be a SGM, 1SG(P), or MSG(P).

c. Should the unit be mobilized, the acting CSM will be appointed CSM and reclassified in MOS 00Z. If the acting CSM is a 1SG(P) or MSG(P), promotion to SGM and reclassification to CSM must be accomplished before entry on active duty.

d. The acting CSM will serve in the current grade held and if not a SGM, he or she will not be promoted to SGM against the CSM position. The acting CSM will not be frocked a CSM.

#### **6-9. CSM vacancies and projected vacancies**

In the USAR CSM Program, a CSM position vacancy is an authorized CSM position that does not have an assigned CSM incumbent. A projected vacancy is one in which the incumbent is scheduled for removal based on the following conditions:

a. Retirement.

b. Maximum age (AR 140-10, para 7-3b (1)(c)).

c. Maximum years of service (AR 140-10, para 7-2g).

d. Completion of a stabilized tour of assignment (para 6-22).

e. Approved voluntary reassignment (AR 140-10, para 2-19) or withdrawal (para 6-26).

f. Cause (AR 135-178 or AR 635-200).

### **Section III**

#### **Selection of CSM Designee and Appointment as CSM**

##### **6-10. General**

The effective management of CSM with rotational and diversified assignments will produce a requirement for the selection of soldiers for initial appointment as CSM. When a current or projected CSM position vacancy cannot be filled by the reassignment of a CSM, a CSM designee will be assigned to the position and appointed CSM, if available. This section prescribes the procedures for the selection of CSM designees and subsequent appointment as CSM.

##### **6-11. Determining and reporting TPU and IMA CSM requirements**

a. Annually, Cdr, PERSCOM (TAPC-MSL) will announce the tentative date a USAR CSM Selection Board will be convened by the DA Secretariat at ARPERCEN to select soldiers as CSM designees. This announcement must be made at least 6 months in advance of the board convening date. Copies of the announcement will be sent to—

(1) HQDA (DAPE-MPE).

(2) OCAR (DAAR-PE), (DAAR-SOEMO), and (DAAR-CSM).

(3) CG, FORSCOM (FCAG-PSM) and (FCCM).

(4) CG, ARPERCEN (DARP-EPA-SM) and (DARP-ZD).

(5) Area commands world-wide (para 1-4c ). The area command will notify subordinate commands (para 6-3a) of the selection board convening date and the suspense for commands to report CSM designee requirements to the area command.

b. OCAR (DAAR-SOEMO) for AGR positions, CG, ARPERCEN (DARP-EPA-SM) for IMA positions, and each ARCOM/GOCOM for TPU positions, will determine the number of current or projected CSM vacancies that will occur in the next 12 months (para 6-9) and cannot be filled by the reassignment of another CSM. The vacancies will be identified by TOE/TDA position, command and, except for AGR positions, geographical location. In addition, the ARCOM/GOCOM will also report the days of the month on which the TPU with the reported CSM vacancy normally schedules training assemblies (such as paid drills).

c. To obtain the best qualified soldiers to fill CSM requirements, the commands or agencies listed below will advertise current or projected CSM vacancies throughout their area of operations. This will permit eligible soldiers an opportunity to request consideration for CSM selection.

(1) OCAR (DAAR-SOEMO) will announce AGR CSM vacancies throughout the AGR community.

(2) Area commanders will announce TPU CSM vacancies

throughout the command. The announcement will include the position, command, geographical location, and normally scheduled drill days, for each CSM vacancy.

(3) CG, ARPERCEN (DARP-EPA-SM) will advertise available IMA CSM positions throughout the IMA, IRR, TPU, and AGR populations.

*d.* A report will be prepared by each ARCOM/GOCOM, OCAR (DAAR-SOEMO), and CG, ARPERCEN (DARP-EPA-SM) that will identify—

(1) The number of current or projected CSM vacancies that will occur over the next 12 months (para 6-9). The vacancies will be identified by TOE/TDA position, command, and except for AGR positions, the geographical location (see (3) below) and normally scheduled drill days. The report must verify that such vacancies cannot be filled by the reassignment of an available CSM.

(2) The estimated number of soldiers to be considered.

(3) Except for AGR positions, the geographical location of the current or projected CSM vacancies. The geographical area should be that sector within a reasonable commuting distance of the location of the CSM position. A radius of 100 miles could form the basis of a reasonable distance. However, reporting commands must clearly identify the geographical location or area since the board is required to make selections within specified geographical parameters.

*e.* Each ARCOM/GOCOM will send the report (*d* above) to the appropriate area command (*a* (5) above). The area command will send a consolidated report to CG, ARPERCEN (DARP-EPA-SM).

*f.* OCAR (DAAR-SOEMO) will send the AGR CSM requirement report to CG, ARPERCEN (DARP-EPA-SM).

*g.* CG, ARPERCEN (DARP-EPA-SM) will—

(1) Consolidate the area command reports into one report for TPU CSM selection requirements.

(2) Receive the AGR report from OCAR (DAAR-SOEMO).

(3) Complete the report required by *d* above for IMA CSM selection requirements.

(4) Send the three reports to HQDA (DAPE-MPE). These reports will form the basis for the HQDA memorandum of instruction (MOI) to the USAR CSM Selection Board.

## **6-12. Eligibility for selection board consideration**

To be considered by a CSM selection board a soldier must be—

*a.* In an active status of the Ready Reserve assigned to the following:

(1) A TPU.

(2) An IMA position.

(3) Control Group (Reinforcement).

(4) Control Group (AGR).

*b.* In one of the following grades of rank, and has executed a statement of acceptance (para 6-14):

(1) If consideration for selection is for an IMA or AGR CSM duty position, the soldier must be a SGM, or a 1SG or MSG on a promotion selection list for promotion to SGM (AR 140-158).

(2) If consideration for selection is for a TPU CSM duty position, the soldier must be—

(a) A SGM; or

(b) A 1SG or MSG on a promotion selection list for promotion to SGM (AR 140-158); or

(c) A 1SG or MSG who is a member of a TPU and who is otherwise eligible for promotion consideration (except for the MOS requirement) with no waiver consideration. DOR and PEBD eligibility will be computed based on the first day of the month the CSM selection board convenes.

*c.* Eligible for continued membership in the Selected Reserve TPU or IMA position for at least 4 years, or serve on AGR status for at least 3 years.

*d.* Within the body fat standards of AR 600-9 and meet the physical requirements for duty as a CSM per AR 611-201.

*e.* Effective 1 October 1992, must be a graduate of the U.S. Army Sergeants Major Academy.

*f.* Otherwise eligible and not in one or more of the conditions listed in paragraph 6-13.

## **6-13. Soldiers not eligible for selection board consideration**

*a.* A soldier is not eligible for selection board consideration who—

(1) Does not meet the eligibility requirements of paragraph 6-12.

(2) Has submitted a request for transfer to the Retired Reserve (unless the request is withdrawn before the board convenes) or retirement orders have been issued.

(3) Is 56 years of age or older during the month in which the selection board is convened.

(4) Has accrued over 31 years of total military service since the soldier's basic pay entry date (BPED) during the month in which the selection board is convened.

(5) Has executed a statement declining consideration (para 6-14).

(6) Fails to execute a statement of acceptance before the convening date of the selection board (para 6-14).

(7) Was removed from the CSM Program, or a CSM selection list, voluntarily or for cause. A soldier who voluntarily withdrew from the CSM Program to enter on AGR status or a tour of duty (para 6-23) is exempt from this ineligibility status.

(8) Is an Army Reserve Technician (ART) scheduled for removal from a TPU based on age, maximum years of service, or nonselect for retention by a qualitative retention board. The soldier has requested continued retention in a TPU that has been approved by the Chief, Army Reserve, or is pending such approval (AR 140-315, para 8i).

(9) Is being carried as in the hands of civil authorities or is under arrest.

(10) Is the subject of an action that may result in the following:

(a) Discharge per AR 135-178 or AR 635-200.

(b) Reclassification for inefficiency or disciplinary reasons.

(c) Punishment under UCMJ or while such punishment is in a suspended status.

(d) Transfer to the IRR as an unsatisfactory participant per AR 135-91.

(11) Is not eligible for reenlistment per AR 140-111.

(12) Has been certified as failing to meet the body fat standards of AR 600-9.

*b.* The authorities cited in paragraph 6-3 or the DA Secretariat will remove a soldier's packet from board consideration if it is discovered that the soldier was ineligible for board consideration or that the packet was not prepared according to the instructions in paragraph 6-15. The soldier's packet will be returned to the appropriate custodian of records with an explanation of the reason for nonconsideration.

*c.* The authorities cited in paragraph 6-3 will remove a soldier's name from the CSM designee selection list when it has been determined that the soldier was ineligible for consideration by the selection board. Before this action is taken the soldier will be notified and offered the opportunity to rebut the reason for the removal action.

## **6-14. Acceptance or declination of CSM consideration**

*a.* Soldiers who meet the qualifications for selection consideration, but do not desire to serve as a CSM, may decline consideration.

*b.* A CSM acceptance or declination statement must be completed each year before the scheduled date the selection board convenes. These statements will not be filed in the soldier's personnel records and will not be reviewed by promotion or selection boards. They will be used only for administrative purposes in assembling records of soldiers desiring consideration for CSM selection. The statement to be executed each year will read as follows:

(1) *Acceptance Statement.*

(a) For TPU, IMA, and IRR soldiers use the following statement: NAME, SSN, and DATE

I accept consideration for Command Sergeant Major for the following announced position(s):

Unit Identification:

TDA/TOE Line & Item Number:

Geographical Location:

I certify that I am within reasonable travel distance of the above position(s), or that I am willing to travel, or be reassigned, if selected and appointed. I understand that if selected I may not decline or voluntarily withdraw from the program before appointment unless extreme hardship or compassionate reasons are cited. (Insert Signature Block)

(b) For AGR soldiers use the following statement:

NAME, SSN, and DATE

I accept consideration for Command Sergeant Major. I understand that if selected I may not decline or voluntarily withdraw from the program before appointment unless extreme hardship or compassionate reasons are cited.

(Insert Signature Block)

(2) *Declination Statement.*

NAME, SSN, and DATE

I decline consideration for Command Sergeant Major and I understand that this declination will not preclude me from being considered by subsequent boards for which I remain eligible. This statement will not be seen by the promotion or selection boards and will not become a part of my military records.

(Insert Signature Block)

c. Soldiers selected for CSM will not be allowed to decline appointment unless extreme personal hardship or compassionate reasons are cited in the request. The appointment authorities (para 6-3) have final approval authority.

d. Soldiers may apply for more than one vacancy. However, a separate acceptance statement is required for each vacancy.

#### **6-15. Preparation, composition, and submission of personnel records packets**

a. Commanders will direct the custodian of records to prepare a certified packet on each soldier who—

(1) Is eligible for consideration (para 6-12).

(2) Has filed an acceptance statement (para 6-14).

(3) Except for a soldier serving on AGR status, is within reasonable travel distance of the announced position(s) or has requested consideration and agreed in writing to travel if selected and appointed.

b. The packet will consist of the following unless modified by the DA Secretariat board announcement message:

(1) Reproduction of DA Form 2 and DA Form 2-1 (Personnel Qualification Record).

(2) Statement of height and body fat content which has been verified by the commander. If the soldier exceeds the body fat standard of AR 600-9, a copy of DA Form 5500-R (Body Fat Content Worksheet (Male)), or DA Form 5501-R (Body Fat Content Worksheet (Female)), as appropriate, must be enclosed with the commander's statement.

(3) *(Rescinded.)*

(4) Reproduction of DA Form 873 (Certificate of Clearance and/or Security Determination).

(5) Reproductions of the last five enlisted evaluation reports (EER) or noncommissioned officer evaluation reports (NCO-ER).

(6) One 4- by 10-inch or 5- by 7-inch full-length official photograph taken in accordance with AR 640-30, paragraph 7.

(7) Reproduction of a "Complete-the-Record" (report code 4) EER /NCO-ER, if submitted per AR 623-205, paragraph 2-9. "Special" reports (report code 5) will not be submitted (AR 623-205, para 2-10b(3)).

(8) A biographical sketch prepared by the soldier in the format shown in figure 6-1.

(9) A statement signed by the soldier that the data contained in the packet is correct and accurate (c below).

(10) Statement of acceptance (para 6-14b (1)).

c. The soldier will audit the completed packet and verify that the data contained therein is current and accurate by including a statement to that effect. This requirement will not be waived and applies to all soldiers.

d. The authorities responsible for CSM management (para 6-3) will review the packets to ensure the soldier is eligible for selection board consideration (para 6-12) and the required documents are included in the packet as required by b above. A memorandum of transmittal will be prepared and placed as the top document on each packet and clearly show that the packet is being submitted for consideration by the USAR CSM Selection Board. The packet will be sent directly to Commander, U.S. Total Army Personnel Command, ATTN: TAPC-MSL-E, 9700 Page Boulevard, St. Louis, MO 63132-5200.

#### **6-16. USAR CSM Selection Board composition and procedures**

a. As announced in paragraph 6-11a, the DA Secretariat will convene a CSM selection board to select soldiers as CSM designees for initial appointment to CSM.

(1) The board will consist of an uneven number of voting members, but not less than 5. Composition of the board will be as follows:

(a) The president will be a general officer.

(b) A Regular Army CSM.

(c) A designated number of USAR CSMs. At least two of the CSMs must be assigned to a USAR TPU. One CSM must be assigned to Control Group (AGR) if AGR soldiers are being considered.

(d) At least one of the members must be a female if females are being considered.

(e) At least one of the members must be of a minority group.

(f) An officer or warrant officer will be appointed as recorder without vote.

(2) An MOI based on the reports submitted per paragraph 6-11f, will be issued by HQDA (DAPE-MPE). The MOI will prescribe the oath to be taken by the board members, the number of soldiers to be selected, the reports to be submitted, and other administrative details as required.

(3) Appearance before the board by a soldier or his or her representative is not authorized. However, the soldier may write a letter to the president of the board inviting attention to any matter of record in his or her packet that he or she feels is important. No communication will be brought to the board's attention unless it is part of the packet or included in the soldier's letter to the board. The letter should be forwarded as part of the CSM packet.

(4) The board will review the military personnel records packets submitted per paragraph 6-15d and select the best qualified soldiers to fill the reported current or projected vacancies. Except for AGR CSM designee selections, the selections will be by geographical area (para 6-11d(3)) and travel distance to the identified position(s).

(5) The DA Secretariat will prepare a list of those selected. The list will be filed as part of the board report. The report will be sent to HQDA (DAPE-MPE), WASH DC 20310-0300 and a copy will be retained by the convening authority. The list will show—

(a) For TPU and IMA soldiers, the name, SSN, grade, CSM position, and projected vacancy date for which the soldier has been selected by the board.

(b) For AGR soldiers, the name, SSN, and grade by date of rank.

(6) After HQDA (DAPE-MPE) approves the board report, a copy of the lists will be sent to CG, PERSCOM (TAPC-MSL-E) who will release the selection results by sending copies with an official release date and time to:

(a) All area commands. The area command will send a copy to subordinate ARCOM/GOCOM. The ARCOM/GOCOM will provide a copy to each soldier who was considered by the board.

(b) CG, ARPERCEN (DARP-EP). This office will notify each IRR or IMA soldier who was considered by the board.

(c) CG, ARPERCEN (DARP-ARE).

(d) OCAR (DAAR-SOEMO).

(e) CG, FORSCOM (FCAG-PSM).

b. When a TPU, IMA, or IRR soldier has been placed on a list as a CSM designee, the position for which he or she has been selected by the board is reserved. It will not be filled by another soldier on the departure of the incumbent, or when established.

c. A TPU, IMA, or IRR CSM designee will be assigned to the CSM position when it is vacated or established. An AGR CSM designee will be assigned to an AGR CSM position, when available, by OCAR (DAAR-SOEMO) under the AGR management process. A CSM designee on assignment to a CSM position will be appointed CSM according to paragraph 6-17.

#### **6-17. Appointment or reappointment to CSM**

a. On assignment to a CSM position, a SGM (CSM designee) will be laterally appointed, or reappointed to the rank of CSM and reclassified to PMOS 00Z5, by the appointing authority (para 6-3). The effective date of the reclassification and appointment or reappointment will be the date the soldier vacates the former position en route to the assigned CSM position. The appointing authority may also direct a future effective date of appointment.

b. On assignment to a CSM position, a CSM designee (ISG or MSG) will be promoted to SGM in his or her current CMF (AR 140-158, para 6-24). The SGM will then be laterally appointed to the rank of CSM and reclassified in PMOS 00Z5. This may be done concurrently by the promotion and appointment authorities. The promotion to SGM will be made off the promotion selection list without regard to the soldier's sequence on the list. The effective date of promotion to SGM, lateral appointment to CSM, and reclassification will be the date the soldier vacates the former position en route to the assigned CSM position. The appointing authority may also direct a future effective date of appointment.

c. The date of rank for a CSM is the date of rank of his or her promotion to SGM.

#### **6-18. Authority to appoint**

The authorities cited in paragraph 6-3 are authorized to appoint to CSM soldiers selected by a CSM board as CSM designees and assigned to a CSM position. They are also the reappointment authority for former CSMs.

#### **6-19. Appointment orders**

Lateral appointment or reappointment as CSM and award of PMOS 00Z5 will be announced in orders. AR 310-10, appendix A, Format 304 will be used for all USAR CSM appointments. The date of rank as SGM remains unchanged.

#### **6-20. Posthumous appointment**

A soldier is eligible for posthumous appointment or reappointment as a CSM, provided—

a. The soldier had been selected by a CSM selection board under this chapter and the results were approved by HQDA prior to death or;

b. The soldier voluntarily withdrew from the CSM Program to enter on AGR status and death occurred while on AGR status as a SGM or;

c. The soldier was involuntarily removed from the CSM Program for other than cause or;

d. The soldier's death was not a result of his or her own misconduct.

#### **6-21. Certificate of Appointment to CSM**

A DA Form 4873 (Certificate of Appointment) will be issued by CG, PERSCOM for appointment to CSM. Certificates may be obtained by providing name, SSN, date of rank, date of CSM appointment, and return address to Commander, U.S. Total Army Personnel Center, ATTN: TAPC-MSL-E, 9700 Page Boulevard, St. Louis, MO 63132-5200. DA Form 4873 will not be retroactively issued for appointment to CSM prior to 1 February 1981.

### **Section IV**

### **Stabilization, Removal, and Termination**

#### **6-22. Stabilization on assignment to a CSM position**

a. On assignment to a CSM position, a CSM will be stabilized in that position for 4 years, or in an AGR position for 3 years. Since 1 January 1983, the stabilized period of assignment commenced, or will begin, on the date of assignment to a CSM position as a CSM. A period of time served in a CSM position prior to appointment as a CSM will not be computed as part of the period of stabilization.

b. A CSM assigned to a TPU, having completed 20 years of qualifying service for retired pay, will not be stabilized beyond the date on which either of the following occurs first:

(1) Attains 60 years of age (AR 140-10).

(2) Completes 35 years of military service (AR 140-10).

c. During stabilization, the removal or reassignment of a CSM will be voluntary unless—

(1) Removed for cause (para 6-24).

(2) The CSM position is abolished (para 6-25).

(3) Removal is based on maximum age or years of service (AR 140-10).

(4) For the needs of the Service (AGR only).

d. On completion of a stabilized period of assignment, a CSM may be—

(1) Retained in the position only under the conditions cited in *e* or *f* below.

(2) Reassigned to another CSM position if available. The reassignment must be voluntary and includes TPU and IMA positions. Needs of the service will dictate reassignment of AGR CSM positions.

(3) Voluntarily withdrawn from the CSM Program, reclassified, and laterally appointed SGM for assignment to a SGM position if available. This includes TPU, IMA, and AGR SGM positions (see para 6-29a (1)).

(4) Voluntarily transferred to the Retired Reserve, if eligible.

(5) Involuntarily transferred to Control Group (Reinforcement) as a CSM. This includes release from active duty if the soldier is an AGR CSM. Management authorities (para 6-3) should strive to retain qualified and experienced soldiers in the Selected Reserve, if possible. Transfer to Control Group (Reinforcement) should occur only when the procedures in (1), (2), and (3) above cannot be accomplished.

e. On completion of a stabilized period of assignment, management authorities (para 6-3) may retain a CSM in his or her current CSM assignment only under the following conditions

(1) Pending completion of a stabilized period of assignment, management authority (para 6-3) may determine that for efficient personnel management it is necessary to retain an incumbent CSM in a hard to fill position; in a high priority unit; or to delay reassignment pending a known and projected position vacancy. When so determined and fully justified:

(a) The management authority (para 6-3) may authorize retention of an incumbent CSM for the number of months required, but not to exceed 24. By the end of the 24th month, unless further retained under (2) below, the CSM must have been processed per paragraph d(2) through (5) above.

(b) During the term of the retention period authorized in (a) above, the CSM is not stabilized and is subject to voluntary or involuntary reassignment by the management authority (para 6-3).

(c) (**Rescinded.**)

(2) Under extraordinary circumstances approved by the authorities cited below. When a CSM, CSM designee, or a soldier eligible for selection board consideration (para 6-12) is not available to replace an incumbent, the CSM can be retained until a replacement can be found. The management authorities (para 6-3) must request approval to retain the CSM and certify that the position has been advertised and no TPU, IMA, AGR, or IRR soldiers are available for assignment to the position. Authority to retain a CSM under extraordinary circumstances rests with—

(a) Area commands for TPU positions.

(b) OCAR (DAAR-SOEMO) for AGR positions.

(c) CG, ARPERCEN (DARP-EP) for IMA positions.

f. At least 6 months before completion of a stabilized TPU assignment, an ART assigned to a TPU CSM position may submit a request for continued stabilization in the position. This request will be according to AR 140-315, paragraph 8i.

(1) The request will be sent through channels and Cdr, ARPERCEN (DARP-PAT-I) to OCAR, ATTN: DAAR-PE, WASH DC 20310-2418. The ART will not be removed from the CSM position while the request is pending final determination by OCAR.

(2) If OCAR approves the request, the CSM will be stabilized in the CSM position. This will be until he or she attains Federal annuity for civil service retirement or age 60, whichever occurs first, unless removed for cause.

#### **6-23. Removal from CSM Program to perform tours of duty or to attend the U.S. Army Sergeants Major Academy**

a. Reclassifications, appointments, and reappointments between SGM and CSM under this paragraph will be announced in AR 310-10, appendix A, Order Format 304.

b. If a tour of duty is available, a CSM may request a tour of ADT, ADSW, TTAD. These tours are described in AR 135-200 and AR 135-210. However, if the tour does not specifically require the services of a CSM, or if the duty or training purpose of the tour is not related to the function of a CSM, then a CSM must be reclassified and appointed SGM on the day prior to entry on the tour of duty. Unless removed from the tour of duty under conditions that would preclude reappointment (such as for cause) on the day following completion of the tour of duty the SGM will be reclassified and reappointed CSM.

c. A CSM who is selected and accepts attendance at the U.S. Army Sergeant Major Academy (USAMSA) will attend in the rank of SGM. The CSM will be reclassified and appointed SGM on the day before departure from his or her organization en route to the USASMA. After graduation, if assigned to a CSM position, or to the IRR, the SGM will be reclassified and reappointed to CSM.

#### **6-24. Removal from CSM Program (for cause)**

a. Any commander, having a CSM or CSM designee under his or her jurisdiction who fails to maintain the expected high standards of a CSM, may recommend removal. The commander may prepare an appropriate recommendation for removal from the CSM Program.

b. The recommendation with supporting documentation will be presented to the CSM or CSM designee. He or she will be given the opportunity to submit a written rebuttal. If he or she elects not to submit a rebuttal, he or she will so indicate by written endorsement.

c. If, after a review of any rebuttal submitted by the CSM or CSM designee, the immediate commander determines the soldier should be removed from the program, the entire case will be forwarded through command channels to the authorities cited in e below.

d. Each commander in the chain of command will review the case and make recommendations by endorsement.

e. The authorities below will take final action on the recommendation. This authority will not be further delegated.

(1) The area commander or deputy commander for TPU soldiers.

(2) The CAR or Deputy CAR for AGR soldiers.

(3) CG, ARPERCEN for IMA soldiers.

f. The CSM or CSM designee will be informed in writing of the final determination through command channels.

g. A copy of all approved removals will be sent to the appropriate authorities (para 6-3) for action to—

(1) Remove a CSM designee from the CSM selection list.

(2) Reclassify a CSM to SGM. The SGM may be reassigned to an SGM position if available. If a SGM position is not available, the SGM will be transferred to the IRR or Retired Reserve as appropriate.

h. Any recommendation for the removal of a CSM made under this paragraph must be accompanied with a "Relief-for-Cause" evaluation report (report code 6). This will be done according to AR

623-205, paragraph 2-11. The CSM may appeal the report as provided in AR 623-205, chapter 4.

#### **6-25. Abolished, redesignated, or reorganized CSM positions**

a. If a CSM position is abolished or redesignated, the incumbent will be reported to the appropriate authority in paragraph 6-3. The CSM will be processed according to paragraph 6-22d as having completed a stabilized period of assignment. A CSM designee on a selection list, scheduled for assignment to an abolished CSM position, will not be removed from the list. Unless removed for cause or other regulatory authority, the CSM designee will remain on the list for assignment to a CSM position if one becomes available. The removal of a CSM because the position was abolished is considered as involuntary.

b. In the event of a TPU reorganization, CSM will be retained in the reorganized CSM position(s) if CSM positions are authorized by the TOE/TDA. The CSM's stabilized assignment will continue in effect and is based on assignment to the previous CSM position. If a CSM position is not authorized or available in the reorganization, the CSM will be processed according to paragraph 6-22 d as having completed a stabilized period of assignment.

#### **6-26. Voluntary withdrawal from CSM Program other than for retirement**

a. A CSM may withdraw from the CSM Program for other than retirement, by furnishing written notice to his or her commander. The notice of voluntary withdrawal will be sent through channels to the authorities in paragraph 6-3. On approval, the CSM will be reclassified to SGM.

b. The appointment authority will reclassify and reassign the soldier to a SGM position, if available. If a SGM position is not available, the soldier may voluntarily accept—

(1) Reduction and reassignment to an existing vacancy in a lower grade.

(2) Transfer to Control Group (Reinforcement) as a SGM.

c. The losing commander must initiate reclassification action when a CSM voluntarily withdraws from the program. The following are considered as voluntary withdrawals:

(1) A CSM who, at his or her own request, is transferred to other than a CSM position vacancy. An exception to this is the CSM who requests transfer to the Retired Reserve.

(2) A CSM who voluntarily enters on active duty (Active Army or AGR) as a SGM, or has taken a grade reduction to MSG.

#### **6-27. Termination of CSM appointment**

a. A CSM will be reclassified as SGM when voluntarily or involuntarily removed from assignment to a CSM position, except to—

(1) Involuntarily transfer to the IRR (para 6-22 d(3)).

(2) Voluntarily transfer to the Retired Reserve.

b. The appropriate commander will immediately reclassify the CSM as a SGM. This is mandatory when a CSM—

(1) Voluntarily withdraws from the CSM Program (para 6-26).

(2) Is reassigned to another position that is not a CSM position (para 6-22d).

(3) Removed for cause (para 6-24).

### **Section V**

#### **Reappointment to Command Sergeant Major**

#### **6-28. Reappointment authority**

a. A SGM may be reappointed to CSM under the provisions of this section without referral to a CSM selection board.

b. The authority to reappoint a CSM rests with the appointment authorities in paragraph 6-3.

#### **6-29. Reappointment policy**

a. A SGM will be reappointed to CSM if he or she—

(1) Was reclassified SGM under paragraph 6-22d and has been reassigned to a CSM position.

(2) Voluntarily withdrew from the CSM Program to enter on

active duty (Active Army or AGR). On release from active duty, is assigned to a CSM position, the IRR, or the Retired Reserve.

(3) Was reclassified as SGM under paragraph 6-22 *d* and is transferred to the IRR or Retired Reserve.

*b.* The following soldiers are not authorized CSM reappointment if he or she—

(1) Voluntarily withdrew from CSM Program (para 6-26) except to enter on active duty (Active Army or AGR) or for retention in the Selected Reserve after a period of stabilization (6-22*d* (3)). Exceptions in cases involving cogent personal reasons (in this instance hardship, employment, and so forth) will be considered by HQDA (DAPE-MPE).

(2) Was removed for cause.

---

OUTLINE OF QUALIFICATIONS

NAME

GRADE

SOCIAL SECURITY NUMBER

DATE OF RANK

DATE OF BIRTH

CURRENT ASSIGNMENT *(Include para and line number of TOE/TDA.)*

TOTAL YEARS OF MILITARY SERVICE FOR LONGEVITY

MONTHS SERVED ON ACTIVE DUTY AND HIGHEST GRADE ATTAINED

CAMPAIGNS *(If none, so state.)*

DECORATIONS *(If none, so state.)*

UNIT LOCATION AND THE PROXIMITY OF MEMBER TO UNIT WHERE POSITION VACANCY EXISTS

MILITARY EDUCATION *(Diplomas/certificates of completion from military schools should be attached. Include enrollment in extension courses or attendance at USARF schools to further career and maintain proficiency in MOS.)*

MEMBERSHIP ON BOARDS/COUNCILS *(Include participation as a member of promotion selection boards, classification boards, NCO advisory councils, etc., on a voluntary basis with or without pay or points, if applicable.)*

UNSATISFACTORY YEARS FOR RETIREMENT PURPOSES *(Identify the year(s) if applicable.)*

EXPERIENCE AS A SGM

HOME ADDRESS

CIVILIAN EDUCATION *(If a degree is being pursued, specific comments should be made to include doctrine pursued, institution, and projected date of completion.)*

CIVILIAN OCCUPATION/POSITION

Figure 6-1. Format for outline of qualifications

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## **Appendix A References**

### **Section I Required Publications**

#### **AR 37–104–3**

Military Pay and Allowance Procedures, Joint Uniform Military Pay System--Army (JUMPS-Army). (Cited in para 2-5.)

#### **AR 135–91**

Service Obligations, Methods of Fulfillment, Participation Requirements, and Enforcement Procedures. (Cited in para 6-13a.)

#### **AR 135–178**

Separation of Enlisted Personnel. (Cited in paras 6-9 and 6-13.)

#### **AR 135–180**

Qualifying Service for Retired Pay Nonregular Service. (Cited in paras 4-4, 4-5, and 4-17.)

#### **AR 135–200**

Active Duty for Training, Annual Training, and Active Duty for Special Work of Individual Soldiers. (Cited in para 6-23.)

#### **AR 140–10**

Assignments, Attachments, Details, and Transfers. (Cited in paras 4-19, 6-9 and 6-22.)

#### **AR 140–111**

U.S. Army Reserve Reenlistment Program. (Cited in para 6-13.)

#### **AR 140–158**

Enlisted Personnel Classification, Promotion, and Reduction. (Cited in paras 4-18, 6-12, and 6-17.)

#### **AR 140–315**

Employment and Utilization of U.S. Army Reserve Military Technicians. (Cited in paras 4-18, 6-13, and 6-22.)

#### **AR 310–10**

Military Orders. (Cited in paras 2-6, 6-19, and 6-23.)

#### **AR 350–15**

The Army Physical Fitness Program. (Cited in para 4-5.)

#### **AR 600–8–2**

Suspension of Favorable Personnel Actions (Flags). (Cited in para 4-5.)

#### **AR 600–9**

The Army Weight Control Program. (Cited in paras 4-5, 6-12, 6-13, and 6-15.)

#### **AR 600–200**

Enlisted Personnel Management System. (Cited in para 2-5.)

#### **AR 611–201**

Enlisted Career Management Fields and Military Occupational Specialties. (Cited in para 6-12.)

#### **AR 623–205**

Enlisted Evaluation Reporting System. (Cited in paras 3-3, 6-15, and 6-24.)

#### **AR 635–200**

Enlisted Personnel. (Cited in paras 6-9 and 6-13.)

#### **AR 640–30**

Photographs for Military Personnel Files. (Cited in para 6-15.)

### **Section II Related Publications**

#### **AR 15–6**

Procedures for Investigating Officers and Boards of Officers

#### **AR 135–18**

The Active Guard Reserve Program

#### **AR 335–15**

Management Information Control Systems

### **Section III Prescribed Forms**

#### **DA Form 5011–R**

Training Evaluation Summary. (Prescribed in para 3-3.)

### **Section IV Referenced Forms**

#### **DA Form 2**

Personnel Qualification Record--Part I

#### **DA Form 2–1**

Personnel Qualification Record--Part II

#### **DA Form 873**

Certificate of Clearance and/or Security Determination

#### **DA Form 4873**

Certificate of Appointment To Sergeant Major

#### **DA Form 5500–R**

Body Fat Content Worksheet (Male)

#### **DA Form 5501–R**

Body Fat Content Worksheet (Female)

#### **SF 88**

Report of Medical Examination

#### **SF 93**

Report of Medical History



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# **TRAINING EVALUATION SUMMARY**

For use of this form, see AR 135-205; the proponent agency is RCPAC.

## **DATA REQUIRED BY THE PRIVACY ACT OF 1974**

**AUTHORITY:** 10 USC 275.  
**PRINCIPAL PURPOSE:** To provide career managers with evaluation of MOS qualification for mobilization purposes. Required when an individual completes an AT/ADT/SADT tour.  
**DISCLOSURE:** Voluntary. The SSN is used to identify the individual. If not provided the member may not be credited with this tour and will be denied future tours.

**GENERAL INSTRUCTIONS:** This form will be used for Individual Ready Reservists in grades E-4 and below participating in AT/ADT/SADT and will be completed by the reservist's immediate supervisor.

1. RESERVIST'S NAME (Last, First, MI)

2. RANK

3. SSN

4. TRAINING UNIT

5. LOCATION

6. TRAINING DATES:

From: \_\_\_\_\_

To: \_\_\_\_\_

6a. During this training period the above named individual performed

In \_\_\_\_\_ MOS.

7. RESERVIST IS:

☐

a. Qualified

☐

b. Not Qualified

to perform in this MOS upon mobilization.

☐

c. Unable to Evaluate

(If blocks 7b or 7c are checked, explain in item 8 below.)

8. COMMENTS: (Include suggested schooling, counterpart training, etc., which would qualify them for mobilization in their Primary Secondary MOS. If additional space is needed, continue on plain paper.)

a. Height: \_\_\_\_\_ in. Weight: \_\_\_\_\_ lbs.

b. APRT: ☐ Pass

☐

Fail; APRT Date: \_\_\_\_\_

☐

Profile/Not administered (Explain below)

9. NAME/RANK OF SUPERVISOR

10. SIGNATURE

## **INSTRUCTIONS**

**FOR INDIVIDUALS:** This form must be in your possession when you report for your tour of Active Duty. You must present it to your immediate supervisor as soon as you are assigned your duty position.

**FOR SUPERVISORS:** The purpose of this form is to provide career managers with an evaluation of the individual soldier's ability to perform in his or her mobilization specialty. If, in your evaluation, this individual is fully qualified then future training will be programmed to maintain proficiency in this MOS and develop Secondary, Additional, or Special qualification skills. If you determine this individual is not fully qualified, please make suggestions for future training which will assist this individual in becoming fully qualified in that MOS. Your suggestions will be used for programming future training.

This completed Training Evaluation Summary is to be mailed to Commander, ARPERCEN, ATTN: DARP-EPO, 9700 Page Boulevard, St. Louis, MO 63132 within 15 days after completion of the training tour.



**Unclassified**

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